

NCOA^{Link}™ INTERFACE DISTRIBUTION

REQUIRED TEXT DOCUMENT

EXHIBIT B

SOFTWARE INTERFACE DISTRIBUTION REQUIRED TEXT DOCUMENT

(page 1 of 3)

<<Licensee company name>> is a non-exclusive Licensee of the United States Postal Service® (USPS®) to provide USPS certified NCOA^{Link}™ interface software to authorized <<Full Service Provider, Limited Service Provider, and End User>> Licensee candidates.

The NCOA^{Link} Product is a USPS proprietary system of move information that on average contains approximately 160 million permanent changes-of-address (COAs) filed with the USPS. These COAs are retained on the file for a four-year period from the move-effective date and the file is updated weekly.

It is important to note that not all Service Providers can provide the same level of service. Data quantity differs based on license level. Full Service Providers receive the full 48 month data set on a weekly basis. Limited Service Providers receive an 18 month data set on a weekly basis. End Users receive an 18 month data set on a monthly basis. All data fulfillments are provided under direct license from the USPS.

The sole purpose of NCOA^{Link} processing is to provide a mailing list correction tool for lists that will be used for the preparation of mailings for acceptance and delivery by the USPS. The NCOA^{Link} Product may not be used to create, generate, or maintain new movers lists or as a source to any other proprietary database for the purpose of redistribution or sale.

An input name and address must match the name and old address on a COA in order to obtain a match. When queried with a matching name and old address as input, the NCOA^{Link} process will yield the new address as the result. New address information is provided only when a match to the input name and address is attained.

Before being added to the NCOA^{Link} file, the **Old** address supplied by the Postal customer must be ZIP+4® coded. The **New** addresses must be ZIP+4 coded and validated using the USPS' proprietary database of actual delivery points. (NOTE: The delivery point database does not include NAMES or COA information.) Each delivery point confirmed **New** address is included on the NCOA^{Link} file. If unable to validate the **New** address, the NCOA^{Link} process will indicate that a move exists but will not provide the undeliverable **New** address.

The typical profile of the **New** address information contained on the NCOA^{Link} file is as follows:

- 80.92% Forwardable moves containing delivery point confirmed **New** addresses – **New** address provided
- 1.18% Moves containing unconfirmed **New** addresses – **New** address not provided
- 13.80% Moved, left no address
- 3.92% PO Box Closed
- 0.18% Foreign moves

NCOA^{Link}™ INTERFACE DISTRIBUTION

REQUIRED TEXT DOCUMENT

(Required Text Document – page 2 of 3)

When possible, postal customers who move multiple times within the NCOA^{Link}™ time period are “linked” or “chained” to ensure that the latest address is furnished when an NCOA^{Link} match is attained. This is not always possible if subsequent COAs are not filed in exactly the same manner as a COA filed previously (e.g., name spelling differences or conflicting secondary information).

The provision of change of address information is controlled by strict name and address matching logic. NCOA^{Link} processing will only provide new address information when queried with a specific algorithm of the name and input address from a mailers address list which matches the information on the NCOA^{Link} Product. Data contained in and information returned by NCOA^{Link} is determined by the move type (Business, Individual, or Family) indicated on a Postal customer’s Change of Address form.

The NCOA^{Link} Product is comprised of approximately 6% business moves, 54% individual moves, and 40% family moves.

All matches made to the NCOA^{Link} file require a ZIP+4[®] coded input address. For name matching, Standard Processing Mode requires inquiries in the following order:

- Business:** Match on business name.
- Individual:** Match on first name, middle name, surname and title required.
Gender is checked and nickname possibilities are considered.
- Family:** Match on surname only.

Under no circumstances shall there be a “Family” match only option.

The NCOA^{Link} customer may choose to omit all “Family” match inquiries and allow only “Business” and “Individual” matches to be acceptable. This processing mode will be known as BI Processing Mode.

The NCOA^{Link} customer may also choose to omit “Business” matches when processing individual names for mailing lists that contain no business addresses under Individual Processing Mode.

The NCOA^{Link} customer may choose to process for only “Business” matches when processing a “Business-to-Business” mailing list which contains no personal (Individual or Family) addresses under Business Processing Mode.

All nickname possibilities are derived from a standard USPS[®] nickname list. In considering alternate presentations of an input name, only reasonable derivatives of the original input name are acceptable. If an input name and address do not match to NCOA^{Link} and alternative queries are attempted, any variations which obtain NCOA^{Link} matches will be provided to the NCOA^{Link} customer for analysis.

When a match or a near match of an input name and address to NCOA^{Link} is identified, a standard NCOA^{Link} footnote is provided indicating the type of match made or reason that a match could not be made.

NCOA^{Link™} INTERFACE DISTRIBUTION

REQUIRED TEXT DOCUMENT

(Required Text Document – page 3 of 3)

The footnote provided is the final result of an NCOA^{Link™} query. At the option of the NCOA^{Link} Licensee, additional footnote values from intermediate queries may be provided. The query name and/or address which generated the specific footnote may not be the exact input or final query name and address provided in the standard output of a USPS[®] NCOA^{Link} process.

The standard output of a USPS NCOA^{Link} process is:

- a. Each original unaltered input name and address as it was presented.
- b. The standardized input address appended with the correct ZIP+4[®]/DPC, other postal values and any other intelligence flags or footnotes that result from the CASS[™] processing segment.
- c. For each mailing address for which there is a match to the NCOA^{Link} hash table(s) as defined in this document, the 11-digit DPBC and a conversion to a standardized address, and standard footnote codes. Software shall assign all applicable standard footnote codes.
- d. When a match is made, the following elements must be returned: the move effective date (CCYYMM), specific name and address utilized in the query that obtained the match, and the move type.
- e. For each mailing address for which there is not a match to the NCOA^{Link} hash table(s), the software shall return all elements as appropriate under a and b as well as any standard footnote codes as may be appropriate.
- f. The urbanization name information, when applicable.
- g. The carrier route information for new (updated) addresses.
- h. DPV[™] results, if returned.
- i. Processing summary report containing information to identify the specific list, the statistics resulting from the NCOA^{Link} process, and a notice of any other processed performed on the list.

An NCOA^{Link} Licensee with questions about specific processes within an NCOA^{Link} software interface and/or results returned from an NCOA^{Link} process must first contact the software distributor for explanation and resolution.

The following trademarks are owned by the United States Postal Service[®]: NCOA^{Link}, ZIP + 4, CASS, DPV, USPS and United States Postal Service.